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CENTRAL INTELLIGENCE GROUP
INTELLIGENCE REPORT

COUNTRY Poland

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SUBJECT Notes on Industry and Trade

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SUPPLEMENT

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1. The Coal Industry has been adapted to maximum output and to maximum possible exports to the USSR. Coal mined in August 1946 amounted to 4,196,608 tons, compared with 2,720,871 tons for the period 1 to 30 September. The metallurgical industry is still suffering from lack of coke as well as certain chemicals for laboratory use, graphite, natural varnishes and carbide; the zinc industry is less developed compared with the iron industry because of the failure of zinc ore deliveries.

In June, the coking and distillation plants of Silesia produced 2,848 tons of benzol of which 1,785 tons were sent to the Soviet Zone in Germany.

In general, the demand for skilled labor remains unsatisfied, particularly in the coal and metal industries. The Central Administration of the Coal Industry expended 120,000,000 zlotys in one school year on training and instruction compared with 78,000,000 zlotys spent by the Central Administration of the metallurgical Industry and a sum in excess of 100,000,000 zlotys spent by the Central Administration of Heavy Industries for the same purposes.

The Central Administration of the Coal Industry (Centralny Zarzad Przemyslu Węglowego) consists of thirteen departments and eighty-three sections. Its expenses, which exceed those of the Ministry of Industry itself and which are paid out of the national budget, amount to 448,928,000 zlotys, as compared to 44,611,000 zlotys for the Ministry of Education, 32,657,000 zlotys for the Polish Foreign Office, 33,725,000 zlotys for the Ministry of Labor and Social Welfare and 24,556,000 zlotys for the textile industry.

2. The Textile Industry is suffering from lack of raw materials and the textile mills in Silesia are working to reduced capacity. Textile mills at Lodz are reported to have only one month's supply of raw cotton.
3. The Light Metals Industry lacks graphite crucibles, laboratory apparatus, transmission belts, wire drawing equipment, rapeseed oil, oleine, and so forth. The factory at Labedy (Silesia), "Zaklady Przetworcze Wyrobów Metalowych", which belongs to the Union in Warsaw, is working at only 25% of its capacity.
4. The Leather Industry is short of raw materials, as well as potassium alum, whale-oils, animal fats, and all sorts of auxiliary products, such as usol, (sic) waxes, talcum, shoemaker's tar, oxalic acid, latex, and needles for shoemakers' machines. During July and August 1946, the Pomerania Union of the

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Leather Industry produced 90,000 kg. of leather for soles and belts, as well as 730,000 uppers. The production of footwear amounted to 24,881 pairs, including 12,000 pairs of army boots. Sales are directed by the "Centrala Zbytu Skorzaneo" in Lodz.

5. The Chemical Industry is experiencing great difficulty in importing materials from abroad. In spite of an increase in the number of chemical plants, the value of production fell during July 1946. At the IIS rubber factory at Grudziadz, only 15% of the production capacity has been put into commission.
6. Private trade and the nationalization of industry: In the Warsaw Voivodate the nationalization of industry is being pursued relentlessly. During the day set aside for "commemoration" the co-operative system "Dzien Wspoldzielczosci" speakers for the PPR and the IIS stressed the importance of the co-operative system and hinted quite plainly that it was merely an intermediate stage prior to collectivization.

The various organizations subordinated to the Ministry of Industry employ 700,000 persons, while those subordinated to the Ministry of Commerce and Food employ about 100,000 people.

Private business firms which numbered some 7,912 in July 1946, employed 63,222 workers (these do not include building and printing firms). Flour mills too are privately run for the most part. The total number of private businesses may be estimated at 12,000 at a maximum, employing up to 100,000 people.

The production value of these 7,912 private businesses is assessed for the first six months of 1946 at 20,718,714,000 zlotys ("free-market" prices). It is expected that in 1947 this figure will be increased to 26,000,000,000 zlotys.

In the province of Krakow, private industrial plants number 1,149 and employ 8,217 workers. At present, plans are being made to adapt private industry to the "planning" scheme for the whole country. For this purpose a "Miedzy Izbowy Osrodek Planowania" ("Inter-Chamber Planning Center") has been organized, attached to the Chamber of Commerce and Industry with head office at Krakow. Private industry in the Krakow province is at present organized in 13 provincial branch associations which are also subordinate to the Chamber of Commerce and Industry. In the province of Poznan, there are some 450 private flour mills (including wind-mills).

7. Wages and Prices -- workers employed in private firms are only granted Category I food rations when they can prove that 75% of the work they carry out is in the execution of orders placed by a public body; they received Category II food rations if only 50% of the work is in fulfillment of public orders.

In the province of Krakow privately owned industrial plants succeeded in maintaining a 70% level of production as compared with their production capacity. In the metal industry allocations of materials were increased up to 50% of the requirements.

In general, working conditions are better in private industry as employers have to provide better conditions for workers. Wages too are higher as the following examples indicate:

In the paper industry, the average monthly wage of an unskilled worker is 3,000-4,000 zlotys, that of a skilled worker, from 6,000 to 8,000 zlotys, and that of a white-collar worker, from 5,000 up.

In private metal industry plants in the Krakow province in accordance with the last collective agreement, an unskilled worker (single) earns up to 4,000 zlotys per month, a skilled worker up to 8,000 zlotys and a highly skilled worker with

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wife and 2 children up to 11,000 zlotys monthly. The rate of salary of white-collar workers varies from 2,000 to 20,000 zlotys.

Masons are paid at 36 zlotys per hour.

Workers in small provincial flour mills earn in cash and flour allocations from 2,500 to 4,000 zlotys plus keep. In addition, private businesses usually have to try to get food allocations for their workers.

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